

Big Sky Value...

Montana Tourism & Recreation Strategic Plan 2003-2007

Tourism and recreation in Montana are at an historic moment. Decisions made – and actions taken – in the next five years will affect Montana's environment, its economy and its citizens for decades. Those decisions and actions must be strategic, and consistent with the values and priorities of Montanans. As the state faces perhaps the largest tourism event in years – the Lewis & Clark Expedition Bicentennial – this Tourism and Recreation Strategic Plan serves as a guide for tourism and recreation leaders as they develop plans and programs for the Bicentennial years and beyond. Tourism can enhance Montana's economy and create jobs, but it also can create challenges. The key is to target high-value, low-impact visitors; to focus resources strategically on sustainable tourism activity that enhances Montana's economy while meeting the needs of Montanans and nonresident visitors in a changing tourism marketplace. There is much at stake.

Tourism is Montana's 2nd Largest Industry, Generating \$1.7 Billion per Year

Montana hosted 9.6 million nonresident visitors in 2001. About 59% of them visited in summer, 20% in winter, 11% in spring and 10% in fall. They had a tremendous economic impact on the state:

- ♦ **Nonresidents spent \$1.7 billion in Montana;** \$1.2 billion for retail items, restaurant & beverage, gas and groceries, or 12% of all statewide sales in those retail goods categories
- ♦ **Tourists ate 110,000,000 meals in Montana, or 2.1 million per week;** \$332 million spent on restaurant meals and beverages, another \$125+ million on groceries and snacks
- ♦ **Nonresident traveler expenditures accounted for \$336 million in 2000 employee compensation**
- ♦ **Approximately half of all commercial airline passengers flying to/from Montana in 2001 were nonresidents¹;** without tourism, Montana could lose a significant portion of its current airline service, negatively affecting other business sectors and economic development efforts

Tourism is an essential element of Montana's economy. Tourism development strategies must be informed by – and integrated with – all of Montana's natural and economic assets: agriculture, mining, forestry, technology, manufacturing, construction and education. This Tourism and Recreation Strategic Plan was developed in the context of tourism's role in Montana's overall economic picture.

Montanans view tourism as an essential component of the state's economy; however, they want the kinds of tourism that maximize benefits to their communities and businesses, while minimizing

Executive Summary

- ❖ Economic Impacts of Tourism
- ❖ Tourism Challenges, Threats, Opportunities & Markets
- ❖ Strategic Planning Process
- ❖ 5-Year Tourism Strategy
- ❖ Objectives & Actions
- ❖ Implementation & Timeline

The 2003-2007 Strategic Plan will guide tourism & recreation in Montana for the next five years & beyond. There is much at stake.



Tourists ate 110,000,000 meals in Montana in 2001, or 2.1 million per week, spending \$332 million in restaurants. Better linkages are needed between tourism & Montana agriculture.

¹ Univ. of Montana Institute for Tourism & Recreation Research, Winter/Spring/Summer 2001; MDT-Aeronautics Division

Spending by nonresident summer travelers dropped by \$28.5 million from 1996 to 2001

Nationally, people are taking shorter vacations; Montana is at a disadvantage because of its distance to major markets.

Strategic, targeted promotions are needed to maintain Montana's market share against increasing competition.

2001 Uses of Montana Lodging Tax

Tourism Promotion, Dev't & Staff:

Dept. of Commerce*	\$6,294,078
16 Tourism Regions/CVBs	2,446,680

Community Grants (DOC):	280,000
Community Tourism Assessment	
Tourism/Rec'n Infrast., Events	

MT Fish, Wildlife & Parks	706,819
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MT Historical Society	674,702
Historical sites/signs	
L&C Bicentennial Commis./grants	
Capitol tours, Scriver Collection	

MT Heritage Preservation	400,000
& Development Commission	
Acquire/manage historic property	

Univ. of MT/ITRR - Research	271,853
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MT Int'l Trade Program (DOC)	200,000
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Agency Lodging Reimbursement	150,014
State employee lodging	

Dept. of Revenue	115,395
Tax collection/admin/enforcement	

TOTAL:	\$11,539,542
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* \$2.6 million spent on Montana advertising

impacts on their own outdoor recreation experiences, and on Montana's outstanding natural, historic and cultural assets.

Tourism Faces Challenges of Competition, Seasonal Declines and Impacts on Assets

Tourism in Montana experienced extraordinary growth from 1990 to 2000; however, statewide activity has leveled off since 1998. In some areas, in certain seasons, tourist traffic or use is heavy and there are impacts. In other seasons and at other locations, facilities and services are utilized well below capacity. Challenges and threats related to Montana's tourism and recreation include:

- ◆ **Year-round tourism has increased, but summer visitation & spending dropped from 1996-2001;** spending decreased by \$28.5 million – average travel group size & length of stay decreased.
- ◆ **Hotel occupancies in Montana vary greatly by region & season,** reaching 80% from July-Sept., but dipping below 60% from Oct.-May, which is below break-even point for most businesses
- ◆ **Tourism seasonality creates instability and increased costs in other sectors:** labor, housing, finance, wholesale, retail, distribution, food & beverage, insurance and transportation all suffer when tourism drops – businesses/airlines must raise prices to make up for seasonal fluctuations
- ◆ **Montana is being outspent by other states as much as 10-to-1 in tourism promotion;** and the state has competitive disadvantages in image/distance from markets, requiring highly targeted marketing
- ◆ **Costs to operate and maintain natural/historic/cultural assets have increased with use,** and stable funding sources are needed to prevent degradation and provide high quality experiences
- ◆ **Visitors seeking certain outdoor recreation activities impact Montanans' recreation experiences,** so a shift in target markets is needed to attract high-value, low-impact visitors
- ◆ **Conflicts about land/water access & management have escalated with increasing use;** solutions, including compromises, limits & allocation, are needed to address management conflicts
- ◆ **Management of natural/historic/cultural assets & promotions requires accurate data tracking,** in order to determine visitor counts, trends, impacts & return on investment of promotion funds
- ◆ **Two-thirds of Montana businesses have fewer than 10 employees** (excluding self-employed) – technical assistance is needed to maintain Montana's family-owned businesses
- ◆ **Montana's lodging tax was created to fund tourism promotion, research & industry education** (similar to a commodity "check-off" program); diversion of the funds for other purposes will diminish their effectiveness, creating a downward spiral of tourism revenues
- ◆ **Strong teams & partnerships are needed to successfully implement the Tourism Strategic Plan**

Changing Tourism Trends Present New Market Opportunities for Montana

Nationally and internationally, the tourism industry has changed dramatically over the past decade. Customer tastes, preferences and travel planning methods are very different. So are transportation and Montana's national and international competition. These trends offer Montana opportunities to focus on attracting high-value, low-impact tourists:

- ♦ **The Time Crunch Affects Travel Planning:** weekend trips (1-5 nights) are up 70% in past decade to 54% of all U.S. travel; longer trips declining; 59 million people use Internet to plan trips
- ♦ **Women Make the Decisions:** women make 75% of all travel decisions; top concerns are safety, hygiene, "creature comforts," shopping, convenience ("one-call," all-inclusive packages)
- ♦ **Mature Travelers Rule:** Americans over 50 comprise 80% of all leisure travel; control 75% of the nation's wealth; seek active experiences, heritage/culture, soft adventure; travel in off-peak times
- ♦ **Family Values are Back (Families are Blended & Multi-Generational):** family travel is up; seek value for the money, variety of things to do, activities designed (and packaged) for kids
- ♦ **History & Culture are the #1 Attraction:** 65% of all U.S. travelers include heritage/cultural experiences on their vacations; segment is more educated/affluent than average traveler
- ♦ **Festivals Attract One-Fifth of All Travelers, esp. Young Families:** most popular events are music, ethnic/folk/heritage, county/state fairs, parades, food festivals and religious festivals
- ♦ **Rural Places are Appealing:** 62% of all U.S. adults visited small town/village; 33% took kids
- ♦ **Packaged Niche Products are Key to Success:** travelers want experiences tailored to their tastes
- ♦ **Business Travelers Deserve More Attention:** business travelers spend most, stay 3.3 nights, combine business with vacation travel; potential targets for Montana business recruitment efforts
- ♦ **Non-Business Meetings & Conventions are Big Business:** 27 million U.S. attendees in 1999; most popular are religious, self-improvement/education, hobby-related; spent \$529/trip
- ♦ **Canadians are Returning:** visitation to U.S. up 9% from 1998-2000; 59% planning/considering travel to U.S. in 2002; 81% prefer packaged vacations, like deals; 87% will use Internet to plan
- ♦ **Europeans Spend Five Times More Time & Money:** \$1,530/trip; like rural places, off-peak times
- ♦ **Adventure and Geo-Tourists are Large Markets:** 92 million soft adventure (camping, hiking, biking, skiing, horseback riding), 31 million hard adventure (rafting, climbing, mtn biking)
- ♦ **Sportsmen Numbers Remain Steady, More Women Join the Club:** 2/3 are men, but women catching up; hunter #'s up 250,000+ nationally 1998 to 1999; more fishermen traveling to fish
- ♦ **Tourists Shop 'Til They Drop:** #1 activity of leisure travelers (63% shop), 1-in-5 spend \$500+
- ♦ **Montanans Spent \$707 Million Outside the State in 1999:** 75% of Montanans take one or more leisure trips annually (higher than national average), spent \$962 million in 1999 (9.5% of income)

Market Opportunities for Montana

Attract higher-value, lower-impact visitors:

- ♦ Create weekend getaway packages targeting nearby metro markets in shoulder seasons
- ♦ Promote "softer side," amenities to women
- ♦ Target mature travelers, provide services
- ♦ Create packages/destinations for families
- ♦ Showcase Montana's heritage/culture
- ♦ Promote festivals & events, esp. L&C events
- ♦ Focus on rural appeal, but nearby amenities
- ♦ Develop specialty/niche packages & products
- ♦ Encourage extended stays, add-ons for business travelers
- ♦ Attract more meetings & conventions
- ♦ Increase promotions targeting Canada
- ♦ Promote specialty itineraries for Europeans
- ♦ Highlight guided (vs. self-guided) adventures
- ♦ Promote limited guided hunting & fishing for highest return, lowest impact on residents
- ♦ Showcase Montana's unique shops, products
- ♦ Encourage Montanans to visit their backyard, keep more "Montana money" at home



Beartooth Highway

National Image of Montana

A 1999 study of consumers in four key metropolitan travel markets revealed potential traveler images about Montana:

Positive Images

- Vast, unspoiled landscapes
- Mountains, water
- Fishing, hunting, hiking, camping
- Western culture: "Cowboys & Indians"

Negative Images

- Lacks sophistication, culture, arts
- Few high quality amenities
- Things to "see", but not to "do"
- Not "kid-friendly", safety concerns
- Hard to access, difficult to purchase

Source: MT Image & Positioning Assessm't, 12/99

Montana's Competitive Advantage

The advantages that Montana has over its competitor states can be summarized by the following descriptors:

- Uncrowded
- Clean air and water
- Healthy and abundant wildlife
- Outstanding historical attractions (authentic, not "Disney")
- 2,000 miles of the Lewis & Clark Trail
- Casual but classy cultural & urban amenities
- Safe
- Good highway/road system
- Genuine, friendly people
- Good value for the money

Montana's Competition has Similar Attractions, Better Access by Air

Research by the American Travel Survey shows that Montana's main competitor states are California, Nevada, Idaho, Utah, Washington, Oregon, South Dakota, Arizona and Colorado. They, too, offer outstanding natural landscapes, national parks, and interesting history and historical sites. But they have advantages in a number of key areas:

- ♦ More urban amenities: shopping, dining, culture
- ♦ High quality entertainment (opportunities to enjoy "name" entertainment and nightlife)
- ♦ More packaged, age-appropriate activities for children
- ♦ Convenient access (especially direct flights from major metro areas)

Top Priority Target Markets Emphasize High-Value, Low-Impact Visitors

The planning team recommends the following demographic and geographic target markets, based on an analysis of current trends, conditions, challenges, threats and Montana's tourism vision, goals and competition:

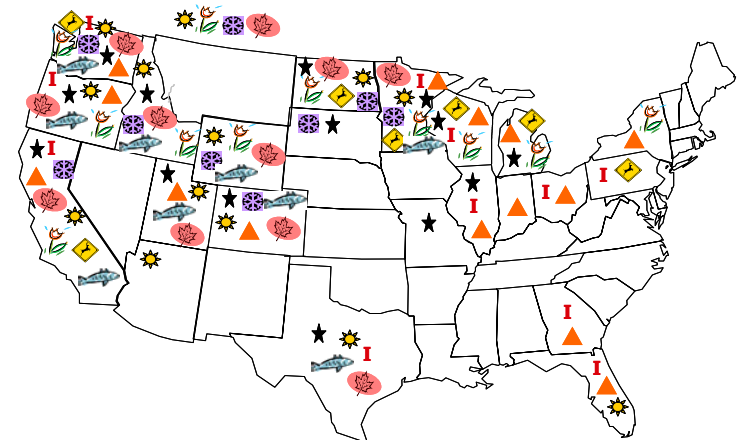
Demographic

- Mature travelers, income \$75,000+
- Couples, income \$75,000+
- Conventions & meetings, esp. non-business
- Heritage/cultural travelers, esp. L&C
- Families with children, income \$75,000+
- Guided adventurers, income \$75,000+

Geographic

- Nearby states/provinces for weekend getaways, conferences, skiers
- California for vacationers
- Southwest for matures
- Midwest for families, skiers
- Eastern metro markets for vacationers
- Europe for couples, families, adventurers
- Montanans for more money kept at home

Montana's 2000-2001 Nonresident Tourist Markets



Actual 2000-01 Visitors

From ITRR Research:

- Winter
- Spring
- Summer
- Fall

From FWP License Sales:

- Nonresident Hunters

From Internet Conversion Research:

MT Web Site Users

State/Regional Targets 2001:

- Travel Montana
- Region/CVB

- Nonresident Fisherman

Tourism Strategic Planning Process was Inclusive & Multi-faceted

This Strategic Plan contains many “fingerprints” – the ideas, concerns, input and wisdom of Montanans from many communities, sectors and organizations. Plan stakeholders – the partners -- include private businesses, regional tourism organizations, chambers of commerce, convention & visitors bureaus, state and federal agencies, universities and colleges, tribes, heritage and cultural organizations, business trade associations, agriculture organizations, sportsmen’s and conservation groups, and elected officials.

The Plan was developed on the principles of community-based strategic planning, involving partners at all levels in a collaborative planning process. Public outreach was key to the plan’s development (see figure to the right). This Strategic Plan, completed in Fall 2002, reflects local values and priorities regarding tourism development, potential impacts, long-term economic diversification and promotion. Successful implementation will require strategic cooperation and assistance of all partners.

Stakeholders Identified Vision, Guiding Principles, Goals, Objectives & Actions

At the initial public meetings that identified the elements of Montana’s vision for tourism in 2007 (and beyond), there was surprising consensus expressed by Montanans from a wide variety of perspectives, sectors and geographic locations. The vision statement has five components presenting a “desired future condition” for tourism and recreation in Montana. Below is a summary of the vision :

VISION: *It is the year 2007. Tourism and recreation in Montana has achieved the following:*

Balance. Montana’s unique character and sense of place are retained while providing quality experiences for both residents and nonresident visitors

Cooperation. Effective public-private-nonprofit-tribal partnerships are engaged in visionary, collaborative planning and implementation efforts which foster economic growth and stability, while respecting the values of Montanans.

Support. Sufficient financial and technical assistance are available from various sources to support effective tourism marketing/research, management of natural/historic/cultural assets, and business development.

Respect. Tourism is recognized as an essential element of Montana’s economy and social well-being.

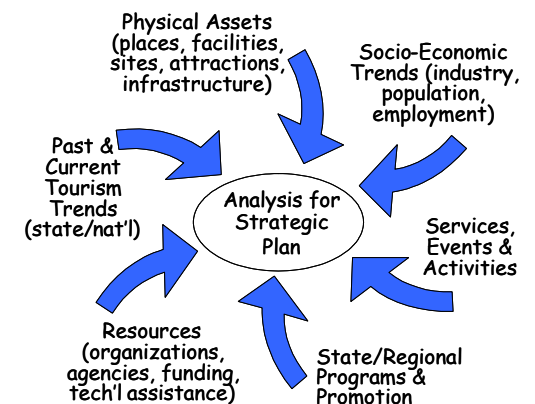
Accountability. A comprehensive evaluation system is being used to measure and track the success and the impacts of tourism development and marketing, consistent with the strategic goals and objectives.

Strategic Plan Public Outreach Efforts included the Following:

- 8 public meetings, 400 attendees (Kalispell, Missoula, Great Falls, Billings, Miles City, Glasgow, Bozeman and Butte)
- Meetings with industry, ag, conservation, culture and other stakeholder groups
- Presentations to TAC, MTRI, regions/CVBs and Governor’s Conference on Tourism (October 2001, February, April, June and October 2002)
- Online survey of representatives from 75 stakeholder groups, 250 participants
- Direct communication with stakeholder representatives, over 650 comments
- Public comment throughout process

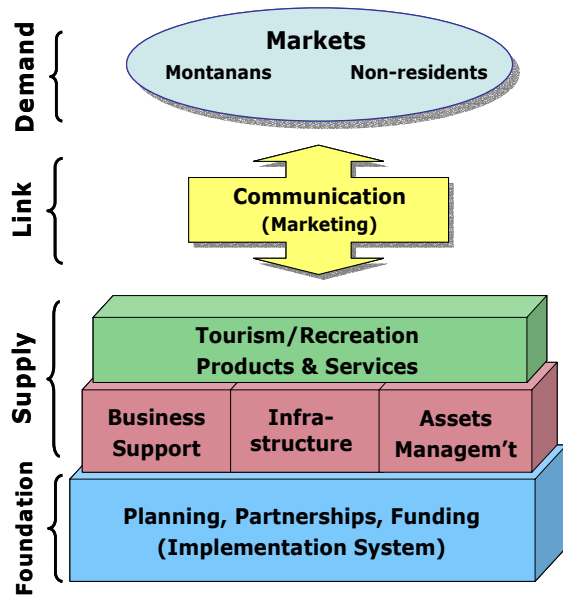
"For the first 100 years of its history, Montana was a 'Company Town.' We have not yet built a strong entrepreneurial legacy in this state."

- Local Montana Economic Development Director



Information-gathering for Strategic Plan

Strategic Plan's Market-Driven Approach



Notes:

Infrastructure refers to tourism-related facilities, signs, visitor centers, transportation, utilities, etc.

Assets Management refers to sustainable management of MT's natural, historic & cultural assets.

Strategic Plan Guiding Principles

- Serve Montanans' needs first
- Manage for sustainability
- Maximize economic & social benefits
- Retain local control
- Respect Diverse needs & perspectives
- Collaborate to resolve issues

Strategic Plan has a Market-Driven Approach: Serve Needs of Montanans & Visitors

Successful tourism and recreation require a market-driven approach (see figure at left). In this case, Montanans and nonresidents are the markets, or "Demand". The product, or "Supply", is the tourism and recreation products/services offered by the public, private and nonprofit sectors (parks, forests, hotels, restaurants, tours, events, airlines, museums, etc.). The quality and success of the product depends upon the building blocks of effective business support services (technical, financial), adequate infrastructure to support tourism (transportation, signs, restrooms, telecommunications services, etc.), and balanced management of Montana's natural, historic, and cultural assets. The "Foundation" of the system is effective, informed planning and partnerships, with adequate funding for implementation. The link between Supply and Demand is communication: marketing, promotion and public relations.

Guiding Principles Define the Plan's Values, or "Moral Compass"

There are many ways to "do" tourism. Montana businesses, citizens and stakeholder groups who participated in the planning process expressed that tourism in Montana should be a high quality experience which respects and celebrates Montana's unique heritage and character, not a "tacky tourist trap." They also want tourism to be sustainable: tourism should contribute to the economy without sacrificing long-term benefits for short-term profits.

The Montana Tourism & Recreation Strategic Plan is guided by six principles. These principles reflect the values, or "moral compass," expressed by Montana citizens through the planning process. They are the standards by which all tourism and recreation programming and actions should be evaluated and prioritized. The guiding principles are:

- ♦ Serve the needs of Montanans first: retain Montana's character, sense of place and assets while providing economic benefits for citizens and businesses
- ♦ Manage for sustainable, high-quality visitor experiences: practice good stewardship
- ♦ Maximize economic and social benefits by targeting high-value, low impact visitors
- ♦ Retain local control of decision-making about types and quantities of visitors to invite
- ♦ Respect diverse needs, perspectives and concerns in tourism planning and promotion
- ♦ Collaborate to resolve issues through positive, inclusive, solutions-based processes

If tourism and recreation planners, marketers and stakeholders adhere to these principles as they implement strategic actions over the next five years and beyond, Montana can achieve the vision for tourism outlined on the previous page.

Seven Strategic Goals Provide Framework for Plan's Objectives & Actions

There are seven broad goals toward which action will be focused to attain the vision for 2007:

1. Enhance awareness and support for tourism and recreation among Montana citizens and elected officials, including additional funding sources to support sustainable tourism.
2. Increase four-season tourism revenues in all regions of the state, through enhancement of products/services that focus on high-value, low-impact visitors, especially heritage and cultural tourists.
3. Implement a more coordinated, proactive system to manage, enhance and protect Montana's natural, historical and cultural assets with balanced, sustainable levels of resident and nonresident visitor use.
4. Improve and maintain tourism and recreation infrastructure to support high quality resident and nonresident visitor experiences.
5. Nurture desirable business growth and diversification in the tourism and recreation industry through business support services and technical assistance.
6. Communicate with the markets through highly targeted promotions that increase awareness and attract desirable tourists; measure, track and evaluate tourism results and trends.
7. Build an effective tourism and recreation "team" to facilitate partnerships, share information and leverage funding/technical resources in order to realize the vision for 2007.

"Tourism and recreation are crucial components of a healthy society, just as essential as other state services such as schooling, sanitation, and justice. The vision for tourism and recreation in Montana should reflect that."

- Citizen at public meeting



Canoeing on the Missouri River

Strategic Framework has 3 Elements: Information, Assets & Teams

To accomplish the strategic goals, the planning team worked with Montana's tourism and recreation stakeholders to identify specific objectives and actions. The seven goals originally generated forty-two objectives and one hundred and fifty specific actions. Those objectives and actions were then prioritized, consolidated and grouped into three key elements that make up the strategic framework:

1. Managing Information
2. Managing (the Use of) Assets
3. Creating Teams

Collection and dissemination of accurate information is critical to good business decisions, asset management decisions and public policy. As visitation, or use, increases, the level of asset management also must increase ("the more guests you have in your home, the more you must vacuum the carpet").

The key to effective implementation of the Strategic Plan actions is to build stronger collaborative teams at the state and regional levels between private, public, tribal and nonprofit sector partners.

"Vision is the world's most desperate need. There are no hopeless situations, only people who think hopelessly."

- Winifred Newman



New Montana Rest Area Design

Strategic Plan Priority Action Areas

- **Managing Information:**
 - Build awareness: tourism & lodging tax
 - Coordinate ads & promotion: state, regions - public relations, packaging
 - Tracking & research
 - Develop MT niche in focused markets
 - Info-sharing: collect/disseminate
- **Managing (Use of) Assets:**
 - Balance between asset protection & visitor/business needs
 - Access to public/private lands
 - Transportation system & signs
 - Good stewardship of natural/historic/cultural assets, some limits
 - Visitor information/interpretation
 - Enhanced communities, facilities
- **Creating Teams:**
 - Linkages between agriculture & tourism
 - Partnerships to address asset mgmt
 - Business assistance
 - Entrepreneurial opportunities
 - Funding partnerships/other sources
 - Enhanced "edu-structure"
 - Effective Plan implementation

Strategic Plan Contains 22 Objectives, 94 Actions and Priorities for Implementation

Over the next five years, Montana's tourism and recreation partners will have ample opportunity and incentive to build stronger collaborations as they work to achieve the Strategic Plan's objectives and actions. A Strategic Plan Objectives and Actions quick reference spreadsheet is contained in Table ES-1.

Not all the Plan's actions will or can be implemented immediately. The strategic planning team developed a priority list of actions based on the context of current tourism trends and challenges, as well as balance and capacity among the partners and their resources. These are summarized in the box at left.

The Implementation System: Enhanced Partnerships, Regional/Local Involvement

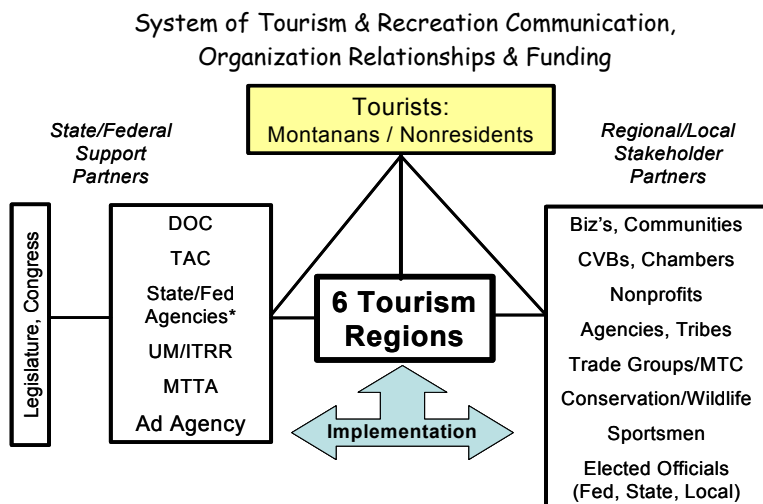
During the past decade, Montana's lead tourism players have focused primarily on promotion activities – building Montana's image and "getting the word out" beyond the state's borders. The success is evident. To be responsive to the *future* needs of Montanans, and to changing markets, a broader, more collaborative role is needed. Effective implementation of this Plan – to best serve the customer and the tourism industry (private, public, tribal and nonprofit stakeholders) – requires enhanced partnerships.

The tourism communication system depicted below can tap additional resources: more partners bring more resources to the table. There are numerous federal, corporate and foundation programs available for tourism and recreation-related projects, if they are linked to economic development, heritage/culture, value-added agriculture, transportation, conservation and education. By reaching out to other partners, tourism stakeholders can create win-win programs to achieve the vision and goals identified in this Strategic Plan. They therefore can preserve the lodging tax for its original intent:

promotion, research and stakeholder education, and they can work with partners to obtain other funds to accomplish additional actions that support community values and high-value, low-impact tourism and recreation.

Next Steps Require Teamwork & Collaboration to Achieve Vision and Goals

Extraordinary opportunities await Montana's tourism and recreation stakeholders! True teamwork and collaboration will result in achieving the vision and goals described in this Strategic Plan. The Plan provides the blueprint for action. It is now up to all of Montana's tourism and recreation partners, including elected leaders, to seize the opportunity and move forward proactively with implementation of this Plan. The result will be economic development and quality of life benefits for all Montanans.



* FWP, MHS, MDT, MAC, DOR, MHPDC, UM/MSU, DNRC, USFS, BLM, NPS, USFWS, COE, BIA, BOR

Table ES.1: Strategic Plan Objectives and Actions

Objective Action	Priority	Timing					Partners (See page ES-12 for key to codes)
		03	04	05	06	07	
A. Managing Information							
A.1 Maintain the Montana Lodging Tax for Tourism Promotion and Development							
A.1.1 Build citizen awareness about benefits/impacts of tourism and uses of lodging tax	1						DOC,TR,CVB,FWP,Ext, BTA,Biz,Ad,NPO,MTC,ITRR,MTTA
A.1.2 Build awareness among elected officials about tourism's impacts and benefits	1						TR,CVB,DOC,TAC,MTC,BTA,Biz,MTRI,ITRR,NPO,MTTA
A.1.3 Seek endorsements from communities and "non-tourism" organizations	2						MTC,BTA,NPO,CVB,TR,DOC,TRB,TAC
A.2 Conduct Strategic Promotions that Attract Top Priority Markets							
A.2.1 Coordinate advertising to maximize state, regional & private Return on Investment	1						Ad, DOC,TR,CVB,Biz,Attn
A.2.2 Encourage cross-promotion between tourism partners and sectors	2						DOC,Ad,DOAg,NPO,TR,BTA,Trb,Biz
A.2.3 Consider options for film production incentives	3						DOC,TAC,TR,CVB,Biz
A.2.4 Plan for promotion of special events & challenges	3						DOC,MLCBC,TR,CVB,NPS,Biz,Ad,FWP
A.3 Create New Tourism & Recreation Products through Packaging							
A.3.1 Assess potential for local/regional packages, & coordinate suppliers	2						TR,CVB,Biz,Attn, NPO,DOC,Trb
A.3.2 Promote off-peak weekend getaway packages/events to "nearby" markets	2						DOC,TR,Biz,CVB
A.3.3 Capture more pass-through travelers with mini-packages	2						Biz,CVB,Attn,TR,DOC,Trb,CC
A.4 Create New "Destinations" with Special Designations & Events							
A.4.1 Work with MDT & legislature to implement Montana byways & corridors programs	2						MDT,TR,Trb,NPO,Biz,MHS,CVB,LG,CC,DOC
A.4.2 Use collaborative efforts to create special designation areas	2						MDT,TR,CC,CVB,DOC,NPO,Trb,LG,Biz
A.4.3 Seek opportunities to host national/international sports competitions	3						CVB,Biz,TR,DOC,LG
A.5 Enhance Montana's Winter Recreation Products/Services							
A.5.1 Refine Montana's niche in the destination ski market & snowmobile markets	1						DOC,BTA,Ad,Biz
A.5.2 Package skiing & snowmobiling with other activities	2						BTA,TR,CVB,Biz,Attn,NPO
A.5.3 Expand "alternative" winter activities	2						TR,CC,CVB,Biz,Attn,NPO, Trb
A.6 Attract More Meetings & Conventions to Montana							
A.6.1 Refine Montana's niche and "brand" in the meeting/convention market;	1						CVB,DOC,BTA,Biz,Ad,LG
determine feasibility of enhanced facilities	2						CVB,DOC,BTA,Biz,Ad,LG
A.6.2 Conduct training on the needs & trends of meeting/convention markets	2						CVB,DOC,Biz,BTA,Univ
A.6.3 Use local historical/cultural attractions to enhance venue offerings	2						CVB,TR,Biz,Attn,MAC,MHS, NPO
A.7 Enhance System of Tracking, Analysis & Information Dissemination for Stakeholders							
A.7.1 Continue strategic research about resident & nonresident travelers	1						ITRR,BBER,DOC,TAC,TR,MLCBC,SA,FA,Biz
A.7.2 Regularly measure Montanans' opinions about tourism & recreation	1						ITRR,DOC,TAC,MTRI,SA,FA,Biz
A.7.3 Conduct regular conversion research to measure results of marketing efforts	2						DOC,TR,ITRR,Ad,CVB
A.7.4 Establish a central "clearinghouse" for data collection, analysis and reporting	1						ITRR,DOC,TR,MTRI,CVB,Attn,Biz, MTTA
A.7.5 Create a statewide "baseline" database of tourism & recreation assets	2						ITRR,DOC,TR,DOR,MTRI,BTA,MRPA,MTTA
A.7.6 Enhance data-gathering systems at attractions & VIC's	1						MTRI,TR,VIC,CVB,CC,Trb,DOC,ITRR
A.7.7 Upgrade lodging tax reporting systems at Montana Department of Revenue	2						DOR,DOC,BTA,ITRR
A.7.8 Coordinate with the private sector for enhanced tracking/reporting	3						CVB,CC,TR,BTA,ITRR,DOC
A.8 Create a Connected System to Share Information & Resources							
A.8.1 Create a tourism & recreation listserv to share information	1						ITRR,DOC,MTC,MTRI,MTTA,TR,NPO
A.8.2 Create a database of tourism/recreation technical & funding resources	3						DOC,MEDA,BBER,MRDP,DLI
A.8.3 Share information about state/regional advertising plans to facilitate coordination	1						DOC,Ad,TR,CVB,Biz
A.8.4 Enhance sharing of tourism & recreation photo libraries	3						DOC,TR,CVB,NPO,MTRI

Table ES.1: Strategic Plan Objectives and Actions

Objective Action	Priority	Timing					Partners (See page ES-12 for key to codes)
		03	04	05	06	07	
B. Managing the Use of Assets							
B.1 Seek Balance Between Asset Protection & Visitor/Business Needs							
B.1.1 Compile an inventory/evaluation of natural/historic/cultural assets & facilities	2						SA,FA,Trb,LG,NPO,Biz,MTRI,MRPA
B.1.2 Select management options that emphasize balanced resident and nonresident use	1						SA,FA,Trb,LG,NPO,Biz
B.1.3 Develop systems of allocated use in sensitive areas	2						SA,FA,Trb,NPO,Leg,F&W Commis.,OLB
B.1.4 Evaluate licensing for all guided recreation activities that involve safety risk	3						OLB,Leg,SA,FABTA
B.1.5 Address motorized vs. non-motorized recreation user conflicts	1						SA,FA,NPO,LO,Biz,LG
B.1.6 Address invasive species problems through partnerships & educational programs	1						SA,FA,DOAg,RC&D,NPO,LO,Biz,
B.1.7 Encourage appropriate use of land conservancy programs	2						FA,DOAg,Ext,LO,NPO
B.2 Address Access Issues on Public & Private Lands & Waters							
B.2.1 Support implementation of strategies to improve access to public lands & waters	1						SA,FA,Trb,NPO,LO
B.2.2 Expand the Block Management Program for access to private lands	3						FWP,LO,TR,NPO
B.2.3 Use special groups to facilitate discussion of access to public/private lands & waters	2						SA,FA,NPO,TR,Trb
B.3 Develop an Enhanced Transportation System in Montana							
B.3.1 Advance implementation of Montana's rest area strategy	2						MDT,DOC,TR,CC,VIC,NPO
B.3.2 Continue to improve roads and bridges; address maintenance backlog	1						MDT,SA,FA,MACo,MLCT
B.3.3 Work with air carriers/airports to identify needs & enhance air service	2						MDT,DOC,TR,CVB,Biz
B.3.4 Advocate for passenger rail service	2						DOC,TAC,TR,CVB,Biz,MDT
B.3.5 Work with car rental agencies to identify needs & enhance services	3						TR,CVB,CC,Biz
B.3.6 Identify opportunities for transit/shuttle transportation in major destination areas	3						MDT,TR,CC,NPS,Attn,Biz,MLCT,MACo
B.3.7 Enhance Montana's trail system	2						MDT,MTRI,STAC,NPO,LG,Trb,Biz,LO
B.4 Create a Comprehensive & Interactive "System" of Visitor Information & Interpretation							
B.4.1 Enhance state rest areas & VIC's with Montana highlights	2						MDT,DOC,DOAg,TR,CVB,VIC,CC,Biz,Leg,FWP
B.4.2 Educate visitors about ethics and responsibilities on public & private lands	1						MTRI,NPO,FWP
B.4.3 Complete implementation of statewide Lewis & Clark interpretive sign strategy	1						MTRI,MLCBC,MHS,DOC,MDT,FWP
B.4.4 Provide professionally-researched interpretive programs & facilities for visitors	2						MHS,FA,Trb,Univ,FWP
B.5 Improve Statewide System of Highway Signs							
B.5.1 Develop/implement sign guidelines for services, attractions & businesses	1						MDT,DOC,TR,MACo,MLCT,Biz,MHS,BTA,Trb, MTTA
B.5.2 Encourage statewide adoption of visitor-friendly symbol signs	3						MDT,DOC,TR,Biz
B.5.3 Address appropriate use/placement of billboards while maintaining landscapes	3						TR,MDT,Biz,MACo,MLCT
B.6 Assist Communities to Enhance Facilities/Services for Tourism Development							
B.6.1 Continue Community Tourism Assessment (CTAP) & Tourism Infrastructure Improvement (TIIP)	1						DOC,LG,Ext,ITRR
B.6.2 Encourage review of city/county/tribal infrastructure & public services	2						LG,Trb,MLCT,MACo,TR,NPO,Biz
B.6.3 Enhance heritage/cultural facilities & attractions to meet visitor needs	2						MHS,MAC,Trb,NPO,Biz,FWP
B.6.4 Encourage community participation in the National Main Street Program	2						DOC,MLCT,MEDA,MHS
B.6.5 Encourage communities to use strategic planning & development tools	2						MLCT,MACo,DOC,MEDA

Table ES.1: Strategic Plan Objectives and Actions

Objective Action	Priority	Timing					Partners (See page ES-12 for key to codes)
		03	04	05	06	07	
C. Creating Teams							
C.1 Identify Opportunities to Link Agriculture with Tourism							
C.1.1 Create mechanisms for tourism businesses to use Montana agricultural products	1						DOAg,BTA,TR,CC,Biz
C.1.2 Enhance existing programs with focus on tourist markets	3						DOAg,DOC,NPO,Biz,TR
C.1.3 Develop cooperative marketing campaigns between agriculture and tourism	2						DOC,Ad,BTA,Biz,DOAg
C.1.4 Educate visitors about Montana agriculture & ranching	3						DOAg,TR,CVB,NPO,Biz
C.2 Create Partnerships to Address Asset Management & Funding Needs							
C.2.1 Identify opportunities for partnerships to address asset needs	1						MTRI,SA,FA,NPO,TR,Biz,Trb
C.2.2 Evaluate agency regulations & policies to determine differences in priorities/programs	2						MTRI
C.2.3 Encourage citizens to volunteer for asset maintenance projects	3						SA,FA,NPO,Trb
C.3 Increase Awareness & Utilization of Business Assistance Programs							
C.3.1 Provide information about business assistance to tourism & recreation businesses	1						DOC,TR,BTA,MTTA
C.3.2 Offer entrepreneurship & management training for tourism & recreation businesses	2						DOC,SBDC,TR,BIZ
C.3.3 Address workforce issues & training programs	2						DLI,TR
C.3.4 Encourage financial lending to provide capital for tourism & recreation businesses	2						DOC,SBDC,MEDA
C.4 Identify Business Opportunities to Serve Visitors on Public Lands							
C.4.1 Identify opportunities for new or enhanced tourism/recreation services	3						SA,FA,Biz
C.4.2 Discuss ways to simplify regulations & permitting processes while protecting assets	3						SA,FA,NPO,BTA,Biz
C.4.3 Investigate contracting of maintenance operations to private businesses	3						SA,FA
C.5 Enhance Montana's "Edu-Structure" to Support Tourism							
C.5.1 Expand education programs for tourism & recreation careers	3						Univ,Ext,TAC,Biz
C.5.2 Develop a staff training program for VIC's	1						DOC,VIC,TR,CVB,CC
C.5.3 Provide regional familiarization tours for state/regional/tribal/local tourism staff	2						TR,DOC,VIC,Attn,Biz
C.5.4 Include educational presentations at tourism & recreation meetings & events	1						TAC,TR,CVB,MTRI
C.5.5 Work with MSU to create "tourism extension agents" in each tourism region	3						MSU,DOC,DOAg,TR
C.6 Build Funding Partnerships to Leverage Existing Dollars							
C.6.1 Encourage strategic partnerships for cooperative project funding	1						SA,FA,TR,CVB,CC,Biz,NPO
C.6.2 Identify opportunities to pool public & private marketing dollars	1						TR,CVB,Biz,DOC,Attn,Ad
C.7 Develop Additional Funding Sources for Tourism & Recreation							
C.7.1 Consider selective and/or local option taxes on goods & services used by tourists	1						Leg,MACo,MLCT,BTA,Biz
C.7.2 Evaluate expansion of user fees for public facility recreation	2						SA,FA,NPO
C.7.3 Encourage attractions to generate more revenue from visitors	2						MHS,FWP,MRPA,DOC,NPO,Biz
C.7.4 Develop local/regional revenue-sharing visitor packages	3						TR,CVB,DOC,Biz,Attn,NPO
C.7.5 Create a "Montana Visitor Passport" program	3						MTRI,DOC,TR,Attn,NPO,Biz,Ad
C.7.6 Seek additional revenue for the Block Management program	3						FWP,LO,NPO
C.8 Develop Partnerships to Facilitate Implementation of Strategic Plan							
C.8.1 Conduct workshops at TAC meeting & in each region to discuss plan implementation	1						TR,DOC,CVB,SA,FA,NPO,Biz
C.8.2 Conduct training for region/CVB boards of directors & members	1						TR,CVB,DOC
C.8.3 Obtain funding to enhance regional tourism organizations	1						DOC,TR,TAC,FA
C.8.4 Coordinate Strategic Plan implementation & monitoring through DOC	1						DOC,MTRI,FWP
C.8.5 Form an implementation team of private/public/tribal/nonprofit representatives	1						DOC,TAC,MTI,MTRI,Trb,NPO,Biz
C.8.6 Coordinate with Governor's Office of Economic Opportunity	1						DOC,MTI,BTA,MEDA
C.8.7 Develop a user-friendly system of annual reporting on status of strategic plan	1						DOC,MTRI,TR,CVB,NPO,MTTA

Action Table Key to Codes

Ad	Advertising Agency	MHS	Montana Historical Society
Attn	Attraction	MLCT	Montana League of Cities & Towns
Biz	Private Sector Business	MLCBC	Montana Lewis & Clark Bicentennial. Comm
BTA	Business Trade Associations	MRDP	Montana Rural Development Partners
BBER	Bureau of Business/Economic Devlpmt	MRPA	Montana Recreation & Parks Association
CC	Chamber of Commerce	MSU	Montana State University
CVB	Convention/Visitor Bureau	MTC	Montana Tourism Coalition
DLI	Montana Dept. of Labor and Industry	MTRI	Montana Tourism & Recreation Initiative
DOAg	Montana Dept. of Agriculture	MTTA	Montana Tribal Tourism Alliance
DOC	Montana Dept. of Commerce	NPO	Non-profit organizations
DOR	Montana Dept. of Revenue	NPS	National Park Service
Ext	Ag Extension Service	OLB	Montana Outfitter Licensing Board
FA	Federal Gov't/Agency	RC&D	Resource, Conservation & Development
FWP	Montana Fish, Wildlife & Parks	SA	Montana Gov't/Agency/Dept/Commission
ITRR	U of M Institute for Tourism & Recreation Research	SBDC	Small Business Devlpmt Corporation
Leg	Montana Legislature	STAC	State Trails Advisory Committee
LG	Local Government	TAC	Tourism Advisory Council
LO	Land Owner	TR	Montana Tourism Regions (Countries)
MAC	Montana Arts Council	Trb	American Indian Tribes
MACo	Montana Association of Counties	Univ	Montana Universities & Colleges
MDT	Montana Dept of Transportation	VIC	Visitor Information Center
MEDA	Montana Economic Developers Association		

**The Montana Tourism and Recreation Strategic Plan 2003-2007
is available electronically at <http://travelmontana.state.mt.us>.
For more information, contact Montana Department of Commerce,
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